Key Member Change Instructions

1. Create spreadsheet(s) of roles and key members to be changed
   - Run GA Reference Module in UBI
   - Select your Project Own Org Name in the Quick Start Menu (or Award Own Org if changing Award Key Members)

   ![Image of GA Reference Module in UBI]

   - Click on Change Req tab

   ![Image of Change Req tab in GA Reference Module]

Visit the UBI Community
- Award Key Member Change Request is the default table.
- Press the Show Project Key Member Change Request button to switch to Projects.
- Use Selection Panes along the left the margin to narrow results to the awards, projects, and roles you want change such as role name, current key member, etc.

*This table will only show active/open awards and projects.*

- Export to Excel (Right click in the table and click on Export) – You will need to adjust the width of some of the columns.
2. **Add replacement names to Spreadsheet(s)**
   - You will need the Employee Name (exactly as it is stored in the Integrated System) and the Employee Number that will be added to a role.
     - This information can be found in the Eligible Key Member Report table, the table to the right of the Award/Project Key member change request table in the **Change Req** tab of the GA Reference Module.

   ![Image of Eligible Key Member Report](image1.png)

   - Click in the column name and type to filter by Employee Name or Employee Org.

   ![Image of flooded columns](image2.png)

   - Delete any projects/awards (rows) that have any status other than open.
   - Copy Employee Number/Employee Name and paste into spreadsheet columns, New Role Holder Name/New Role Holder Emp Nbr
   - You can use different replacements for different rows
   - If desired, change the New Role Holder Start Date column to reflect the date you want the replacements to be effective (it defaults to the date you ran the report)
   - If just end-dating a role without a replacement, put “NONE” in New Role Holder Name column (certain roles MUST have a replacement)
   - Delete any rows you do not want changed
   - Do not change column headings
   - Do not change data in any columns other than Start Date

3. **Send Spreadsheet to a Role Maintainer**
   - Send an e-mail with the spreadsheet attached to the Role Maintainer email address for your area
     - **List of Role Maintainers**

4. **If 50 or more changes**, Role Maintainer send spreadsheet to Enterprise Applications
   - Send an e-mail to **ea-garequests@virginia.edu**
   - Include:
     - Spreadsheet(s) with replacements
     - Name of Responsibility used by Role Maintainer
   - IS will confirm Role Maintainer’s Responsibility and will make the changes using that responsibility (thereby adhering to Role Maintainer’s limitations)